

Basic IROC Training: Instructor Guide

Maintaining Rosters

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Overview

This instructor guide is intended to be used with the Maintaining Rosters presentation and demo. The student guide follows the same format; encourage students to follow along and make notes. After the demonstration, provide students with the scenario material so they can put into practice what they have learned.

Additional instructor notes appear in boxes throughout this guide.

When demonstrating the incident screens and functions in IROC Portal, make sure you are logged in as a Dispatcher so that functions and screens are consistent with your users in class.

Note that assignment rosters are currently not covered here. They will be covered when discussing filling requests.

1. Describe Objectives

The objectives are also shown in the Maintaining Rosters PowerPoint presentation.

Upon completion of this unit, you will be able to:

- Create a roster in IROC.
- Add positions to a roster.
- Modify existing positions on a roster.
- Manage the roster list.

2. Discuss Rosters Overview

A roster is a list of resources attached to a parent request or resource, based on a predetermined configuration, as defined by an NWCG configuration and the resources that fill each position in the configuration. The standard NWCG configuration for a Type 3 Helicopter Module, for example, is a manager and two crew members. A roster for this module would consist of the three positions and the names of the people filling them. For example, HMGB—Bill Adams, HECM—Bradley Hutton, and HECM—Allison James.

This guide describes how dispatchers can create and maintain rosters within IROC.

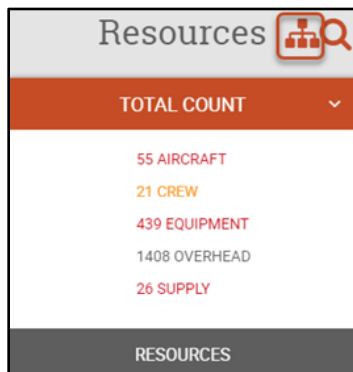
Walk students through the Rosters screens and demonstrate how to create new rosters and modify existing ones. You can use the Nancy scenarios to help students follow and apply the concepts.

3. Creating a New Roster

Example scenario: Nancy is a dispatcher within the Boise Interagency Dispatch Center. She needs to create a roster from scratch in IROC. In the Roster screen, she chooses **Create New Roster** and selects Crew from the **Catalog** field. In the **Method of Creation** field, she chooses **Create From Scratch**. Nancy chooses CREW-T1-BOISE-IHC as the **Resource Name**. IROC populates **Roster Name** with the resource name. Nancy clicks **Create Roster** to complete the process. Her roster appears on the right, and the screen on the left now defaults to **Edit Existing Roster**.

Let's walk through the steps used by Nancy to create this roster.

- 1 On the IROC homepage, click the **Roster** icon in the Resources action tile to open the Roster screen.



You may want to remind users that all items marked with an asterisk (*) in IROC are required. In addition, unless otherwise noted, users can type directly in each field. In IROC, typing in a drop-down menu results in a type-ahead search to narrow down the choices in the list.

Throughout the process of creating or modifying rosters, IROC will automatically save work every five minutes. A system message will appear at the top of the screen in a green bar. This message will disappear after a short time, or users can click the small x in the top-right corner of the bar to remove the message.

- 2 Make sure the **Create New Roster** radio button is selected.

Note: This view is the default after clicking the **Rosters** icon on the Resources tile.

3 Select a **Catalog*** category: Aircraft, Crew, Equipment, or Overhead.

4 Select a **Resource Name***.

Note: Items in the **Resource Name** drop-down are filtered by the selected catalog.

5 Select the **Method of Creation**.

a **Create From Scratch** – Create a new roster for the resource.

b **Create From Master Roster** – Create a new roster using resources from an existing roster; select an existing **Master Roster*** from the drop-down that appears after selecting this option.

Note: The **Create From Master Roster** option will not appear in the drop-down if a master roster is not available for the chosen resource.

c **Create From Configuration** – Create a new roster using an existing configuration; select a **Configuration*** from the drop-down that appears after selecting this option.

Options for Creating a Roster

Create from Scratch – Creates a new roster with no pre-existing information.

Create from Master Roster – Create from an existing roster that already contains resource positions. Users can start with a master roster and add or remove resources as required. They can then save this roster. The master is a template to help users create their own roster.

Create from Configuration – A configuration is one or more catalog items (children) grouped together to create another catalog item (parent). A predefined configuration would commonly include the resource positions necessary to support a resource. For example, an NWCG configuration for a Type 3 Helicopter is a manager and two crew members.

General Rules for Creating a Master Roster

To be included on a master roster, a resource must meet the following criteria:

- Qualified as a configuration catalog item.
- Be from the Aircraft, Crew, Equipment, or Overhead catalog.
- Not be from the Supply catalog.
- Not be a service.
- Not be on a CWN contract or agreement.
- Not already be on a roster.
- Not be removed from IROC.

6 IROC defaults **Roster Name*** to the resource item name. To rename the roster, simply type in the field. The roster name must be unique.

Tip: If the **Roster Name** field is grayed out, click the **Edit** icon to make it active and then type in the field.

- 7 Click **Create Roster**. Your roster appears on the right side of the screen, with the roster name showing at the top. In this screenshot, **Create From Configuration** was chosen.

Note: The left side of the screen now shows the **Edit Existing Roster** radio button selected and includes the information for the roster.

Note: When creating a roster using a master roster or a configuration, your roster will be populated with positions, as shown on the right side of the screen. You can add positions as described in [Maintaining a Roster](#).

Note: The number to the right of the position indicates the sequential order of the roster position.

4. Maintaining a Roster

Example scenario: Nancy wants to add a transport bus to her roster. She searches for and opens the roster. In the Add Positions pane, she chooses **Equipment** from the **Catalog** drop-down. In the **Catalog Item** field, she types “bus” to populate the list with all entries with “bus” in the title; she chooses **Transportation, Bus, Crew Carrier**. Because she needs two buses, she selects two positions. When done, she clicks **Add Position**. She also needs to add two drivers to the roster; to do this, she chooses **Overhead**, and types “driver” in the **Catalog Item** field until she sees the type of driver she wants. She chooses **DRVB – Driver Class B**, two positions, and Qualified Only. Nancy then clicks **Add Position**. She then clicks **Save Roster** on the right side of the screen to save her work.

Finding an Existing Roster

- 1 To modify an existing roster, click the **Rosters** icon in the Resources action tile on the IROC homepage.
- 2 In the Roster screen, click the **Edit Existing Roster** radio button.
- 3 Choose the **Catalog*** to which the roster belongs.
- 4 Select the **Resource Name*** from the drop-down.
- 5 Select the **Roster** from the available items in the drop-down. The **Roster Name*** field will automatically populate, and the roster information will appear on the right side of the screen.

Tip: To edit the **Roster Name** field, click the **Edit** icon in the right side of the field to make it editable.

The items in the **Roster** drop-down are limited by the selected resource name. Selecting the roster allows the dispatcher to edit the positions associated with it.

Editing the roster name does not change any of the positions in the roster.

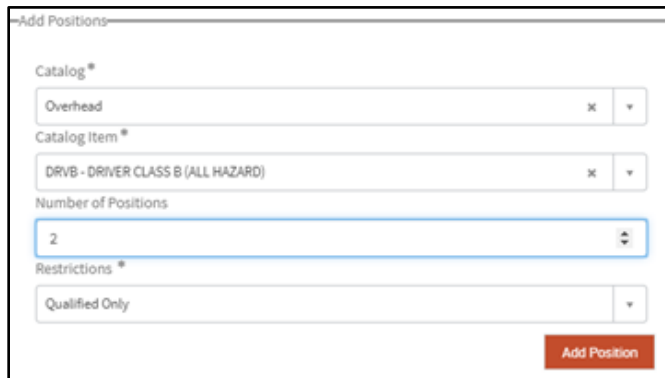
From here, you can clear the roster, delete the roster, reserve it, or add or modify positions, as described below.

Adding Positions to a Roster

During or after creating a roster—whether from scratch, a master roster, or a configuration—you may need to add positions.

The information in the Add Positions pane changes depending on the items selected. The screenshots in this guide may look different from what users see on their screen, depending on where they are in the process or what items they have selected from the drop-downs.

- 1 To add positions to the roster, follow the instructions under [Finding an Existing Roster](#), if necessary.
- 2 Select a **Catalog*** from the drop-down in the Add Positions pane.



Note: The fields in this section change depending on the chosen catalog.

- 3 Choose a **Catalog Item***.

Note: The **Catalog Item** field is filtered by the selected catalog.

- 4 Choose the **Number of Positions** required for this resource.
- 5 Add **Restrictions***. This field only appears if applicable.
- 6 Click **Add Position**. Positions associated with this roster will appear on the right side of the screen. Continue to add positions until your roster is complete.

Modifying Existing Resources on a Roster

As with the Add Positions pane, the information in the Add Resources pane may vary slightly depending on the resource chosen and the various attributes of that resource. The screenshots in this guide may look different from what the users see on their screen.

- 1 To add or edit a resource associated with a roster position, click the **Edit** (✎) icon for that position in the list on the right to bring up the Add Resources pane on the left.

The screenshot shows the 'Add Resources' pane with the following fields and values:

- Catalog:** Overhead
- Category:** Positions
- Catalog Item:** ICT4 - INCIDENT COMMANDER, TYPE 4
- Roster Name:** Crew T1 Boise IHC
- Restrictions:** Qualified Only
- Local Inventory:** ☒ (selected)
- Non-Local Inventory:** ☐ (unselected)
- Resource:** (empty field)
- Buttons:** Cancel, Add / Edit

Note: Grayed-out fields are shown for reference only and are not available to edit.

Note: Fields available will vary, depending on the resource catalog.

- 2 In the Add Resources pane, you may make changes to the position requirements or add a resource.
 - a **Restrictions*** – All overhead and certain crew resources are limited by qualification—Qualified Only, Trainee Acceptable, or Trainee Required.
 - b **Resource Inventory Source** – Select either **Local Inventory** or **Non-Local Inventory** to filter the list of available resources for the position to either those resources from your current dispatch center or resources from another dispatch.

Tip: To add **Non-Local Inventory** resources to your roster, select the **Non-Local Inventory** radio button in the Add Resources pane. Doing so brings up the **Dispatch** drop-down, where you can choose the appropriate dispatch center before selecting a resource.

- c **Resource** – Select a **Resource** from the drop-down.
- d **Reserved** – Click the **Reserved** checkbox, when available, to mark a resource as reserved.

Note: Reserved is a status only and will not prevent the resource from being assigned to another incident.

- 3 **Set Available** – To change an unavailable local resource to available status, click **Set Available**.

Note: If the resource is already available, this action button will not appear.

- 4 When done, click **Add/Edit** to add the resource to the position or to save the edits; click **Cancel** to abandon your changes.

5. Managing the Roster List

There are many options for managing the roster positions on the right side of the screen.

The screenshot displays the 'CREW - T1 - BOISE IHC' roster management interface. At the top right, there are two buttons: 'Clear Roster' (blue) and 'Delete Roster' (red). Below the header, a roster list is shown with 8 positions. Each position is represented by a row with a number (1-8), a pencil icon for editing, a red 'X' icon for deletion, and a text label indicating the resource type and status (e.g., 'CRWB - CREW BOSS (Qualified Only)'). At the bottom of the roster list, there are two buttons: 'Reserve Roster' (blue) and 'Save Roster' (red).

Note: Rosters will automatically save periodically. A green confirmation message will appear at the top of the screen, reminding you the record was saved.

- 1 **Add Documentation** – Click the **Documentation** icon (📄) to add user documentation/journal entries.
- 2 **Clear Roster** – Click **Clear Roster** to remove all positions and resources from the roster.
- 3 **Delete Roster** – Click **Delete Roster** to remove the roster, including all positions and resources.

Note: You will be prompted to confirm the **Clear Roster** and **Delete Roster** actions.

- 4 **Roster Status** – The numbers at the top of the roster indicate roster position and resource status.
 - a The first set of numbers beside the roster name, such as 2/7, show the number of positions filled with a resource and the number of positions listed in the roster.
 - Example:** “0/20” shows no position filled out of 22 total positions.
 - b The second number beside the roster name shows the number of positions filled with a resource that is in an unavailable status.
 - c Lines highlighted in red indicate that an assigned resource is in an unavailable status.
- 5 **Reorder Positions** – To reorder the list of roster positions, click and drag a position to a different line in the roster.

Note: The numbers on the left will automatically shift.

- 6 **Delete Positions** – To delete a position from the roster, click the **Delete** (✖) icon in that row.

- 7 Reserve** – To mark the roster as reserved, click **Reserve Roster**.
- 8 Save** – To complete the roster, click **Save Roster**.
- 9 Return to IROC Homepage** – To exit Rosters and return to the homepage, click **Home** on the top left corner of the screen.

Note: It's important to click **Save Roster** before exiting Rosters. When leaving Rosters to return to the homepage, a dialog box will appear verifying you have saved your work. Click **Cancel** if you still need to return and save your roster, or click **OK** to continue to exit.

6. Objectives Review and Closing

You can use this time to lead an actual demo in IROC Portal or move directly into the scenario, depending on how you taught the material in this course. Use the PowerPoint presentation slide to review the objectives for this course and address any questions or comments.